

VIRGINIA'S MEDICAID PROGRAM

DMAS

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Commonwealth of Virginia

Medicaid and Schools Program

Medicaid Eligibility Matching

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Medicaid Eligibility Matching

Learning objectives:

1. Understand why an accurate eligibility match is important
2. Understand how the results of the eligibility match are used in the reimbursement process for AAC and for the Direct Medical Services Cost Report
3. Know the timeframes and deadlines involved
4. Understand how to complete an eligibility match using the web-based system
5. Gain some helpful tips and tools to ensure that your school division is maximizing your AAC and Cost Report reimbursement through employing a robust matching process, while meeting all program requirements

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Medicaid Eligibility Matching – Why?

Cost-Based Reimbursement Methodology

Allowable Costs for AAC & Cost Report	X	RMTS Results (Statewide)	X	Medicaid Penetration Factor (School Division specific)	=	Gross Medicaid Reimbursable Amount
\$500,000 \$25,000	X	10%	X	50%	=	

Significant impact on reimbursement!

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Before you can begin...

Before any school division can begin utilizing the web-based eligibility matching system, the following items must be in place:

1. Privacy & Security Agreement with UMMS directly
2. Designee form to designate any staff to be given login access to the website and permission to perform eligibility matching tasks on behalf of the school division. There are 2 separate eligibility roles indicated on the form:
 - **Eligibility Uploader:** Creates a school division student roster in correct upload format and template and uploads the file to the matching system
 - **Eligibility Reviewer:** Reviews the matching results, reviews possible matches and other scenarios requiring school division decision and manual intervention to complete the match
 - Roles can be assigned to the same person or to different people
 - Multiple users may be assigned if needed

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4

Medicaid Eligibility Matching

- Medicaid Eligibility Matching is integral to the Medicaid and Schools Program.
- School Divisions will need to complete a minimum of 5 matches per year as of defined *effective* or *snapshot* dates.

DMAS Eligibility Effective ("snapshot") Date	Fiscal Quarter	Results Used in (AAC / Cost Report)	School Division Students to be Included	School Division Student Enrollment Effective ("snapshot") Date
September 1	Q1 (7/1-9/30)	1 st Quarter AAC	Division-wide total enrollment	September 1
December 1	Q2 (10/1-12/31)	2 nd Quarter AAC	Division-wide total enrollment	December 1
December 1	Q2 (10/1-12/31)	Annual Cost Report	Dec. 1 Special Education Child Count	December 1
March 1	Q3 (1/1-3/31)	3 rd Quarter AAC	Division-wide total enrollment	March 1
June 1	Q4 (4/1-6/30)	4 th Quarter AAC	Division-wide total enrollment	June 1

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5

Eligibility Files – “Snapshot” Concept

The CMS-approved reimbursement methodology prescribes the use of a “snapshot” in time on **one day** of the claiming period to calculate the Medicaid Penetration Factor to be used for that period.

Therefore, the Medicaid Eligibility Matching system compares:

- Medicaid’s enrollment file, which includes all children from age 2 through their 22nd birthday enrolled in Medicaid (including FAMIS) as of the snapshot date

This is compared (matched) to:

- School Division’s enrollment file, which includes all students enrolled in the school division as of the snapshot date

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6

Eligibility Files – “Snapshot” Concept

Matching Illustration:

School Division Enrollment File	DMAS Enrollment File
1. Apple, Amy A; dob 1/1/11; F	Apple, Amy A; dob 1/1/11; F
2. Banana, Bert; dob 2/13/12; M	No matches
3. Carrot, Carl; dob 7/2/13; M	Carrot, Carl; dob 7/12/13; M
4. Eggplant, Ella; dob 6/3/10; F	Eggplant, Ellen; dob 6/3/10; F
5. Fig, Fiona; dob 3/18/09; F	No matches
6. Garlic, Gary; dob 3/22/18; M	No matches
7. Lettuce, Lucy; dob 4/10/18; F	No matches

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7

Eligibility Files – “Snapshot” Concept

Understanding the “snapshot” data – an example:

In my student enrollment file, my student Fiona Fig is a student that I know is enrolled with Medicaid. So why didn't she match?

- **Possibility #1:** Fiona's name, dob, gender is too different from how Medicaid's enrollment file has her listed for it to match successfully.
School Division Info: DMAS Info:
 Fig, Fiona; dob 3/18/09; F Onion-Fig, Flora; dob 3/18/09; F
- **What can I do?**
 - Try adding her Medicaid ID to your school division enrollment file to increase the chance of getting at least a “possible match”
 - Use the “individual override” option to match with her Medicaid ID

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8

Eligibility Files – “Snapshot” Concept

Understanding the “snapshot” data – an example, continued:

- **Possibility #2:** Fiona's enrollment with DMAS was not “active” on the day that the snapshot was generated
 - Eligibility can sometimes be retroactively reinstated
 - Eligibility can also be retroactively terminated
- **What can I do?**
 - Try adding her Medicaid ID to your school division enrollment file to increase the chance of getting at least a “possible match”
 - Use the “individual override” option to match with her Medicaid ID
 - If neither of these options yields a match, then you know that some kind of retroactive activity occurred **or** the child simply was not eligible for Medicaid on the snapshot date. There's nothing more to do. This student **cannot** be counted as “eligible” in your claim statistics.

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9

Student Roster Matching Instructions

As a Medicaid Coordinator (or other designated eligibility uploader or reviewer) my best friends are the instruction guides!

- Find what you need on the DMAS website page that's dedicated to Medicaid school-based services:
<https://www.dmas.virginia.gov/#/medandadminreimbursement>
- For Medicaid Eligibility Matching, refer to the "Medicaid Eligibility Matching User Guide"
 - Step-by-step instructions
 - Screenshots to help you follow along
 - Sample reports

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10

Create a School Division Enrollment Roster

School Divisions upload their school-wide rosters including:

- Name
- Unique student ID
- DOB
- Gender
- Address
- Special Education Status
- Medicaid ID ("RID") – if known
- Optional Field
- Parental Consent Status (required only on 12/1 Billing Compliance Review (BCR) matching file only)

Rosters must be run using a 'snapshot' of the School Division's enrollment effective as of the 1st day of the 3rd month of the quarter (3/1, 6/1, 9/1 and 12/1)

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11

Student Roster Upload Process

Create and upload an Excel file including the required data using the correct file format and headings. Use the provided template to reduce the likelihood of formatting errors.

Student Unique ID	RID	Last Name	First Name	Middle	Date of Birth	Gender	Address Line 1	Address Line 2	City	State	Zip code	SPED	Optional
20		Apple	Amanda		1/9/2006	F	148 Summer Street		Richmond	VA	23225	N	
9		Barbara	Betty		12/29/2008	F	4 West Street		Richmond	VA	23224	N	
22		Ginger-Root	Gregory		1/6/2006	M	1400 Surf Drive	Apt. 198	Richmond	VA	23225	Y	
24		Grape	Alexandra		1/26/2009	F	98 Jenny Lane		Richmond	VA	23222	Y	
1		Green	Lucy		10/20/2003	F	392 Lile Lane		Springfield	VA	22150	Y	IEP Student
14		Grey	Lucinda		10/22/2001	F	100 Pine Avenue		Springfield	VA	22150	Y	
30		Hamburger	Harold		9/1/2002	M	209-B Back House Ln		Richmond	VA	23229	Y	IEP Student
32		Homerun	Bradley		6/6/1999	M	459 Stadium Way		Richmond	VA	23231	Y	
29		Holding	Herman		8/22/2002	M	99 Pagana St		Richmond	VA	23228	Y	IEP Student
17		Kiel	George		1/9/2006	M	101 Sydney Lane		Richmond	VA	23229	Y	Parental Consent Y
25		Lemon	Larry	P	2/9/1999	M	15 Seagull Lane		Richmond	VA	23224	Y	
28		Lettuce	Louisa-Jane		8/14/2001	F	892 Train Track Lane		Richmond	VA	23227	Y	IEP Student
23		Nectarine	Nancy		11/18/2006	F	52 Bay Blvd		Richmond	VA	23221	N	
11		Onion	Kim		11/12/2001	F	79 Park Ave		Richmond	VA	23224	Y	Parental Consent Y
5		Orange	Ollie		6/22/2003	M	34 South Street		Springfield	VA	22079	Y	
13		O'Reilly	Linda		8/12/2002	F	200 S. Pineapple Way		Springfield	VA	22079	Y	Parental Consent Y
15		Parsley	Paul		1/9/2006	M	500 Winter Street		Richmond	VA	23224	N	
27		Peach	Morgan		7/12/1999	F	87 Main St, Unit E		Richmond	VA	23226	Y	IEP Student

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12

Student Roster Upload Process

After successfully uploading file, the system verifies the file and completes the match

State: School District

Your file has been queued for processing. The application will:

- Verify that data is in the proper format
- Upload the information
- Perform the automated matching process

The time needed to perform these steps will vary depending upon the size of your file and the number of other files that are in the queue.

*Year: 2016
 *Quarter: 1
 *School District: A B C Public Schools
 *File Path: Choose File | no file chosen

Upload

Today's Uploads:

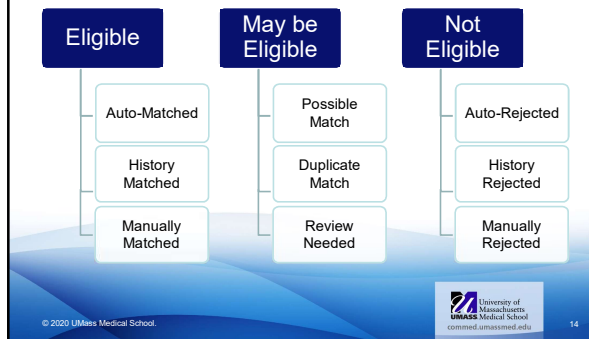
Refresh Delete

School District	File Name	Year	Qtr	Upload Date	Status	Record Count	Download	Uploaded By
A B C Public Schools	SMH_SDVA_4981243_1_2016_01.XFR	2016	1	09/12/2015 05:42:56 PM	Queued			Audette

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Matching Process

System matching process separates students into these categories:



Matching Status Definitions

- Auto Matched:** These students were an exact match to a recipient in the DMAS eligibility file.
- Manually Matched:** These students were manually matched to a recipient in the DMAS eligibility file.
- History Matched:** These students exactly matched a pair of records (School Division record and DMAS eligibility file record) that was previously manually matched.
- Possible Matched:** These students are close matches to one or more students in the DMAS eligibility file. Further review is required by school division personnel.
- Review Needed:** These students were not manually matched or manually rejected. The school division reviewer assigned these records for further review.
- Auto Rejected:** These students were not matches or even possible matches to any recipient in the DMAS eligibility file.
- Manually Rejected:** These students were manually determined not to match any recipient in the DMAS eligibility file.
- History Rejected:** These students exactly matched a pair of records (School Division record and DMAS eligibility file record) that was previously manually rejected.
- Duplicate Matched:** These students are close matches to one or more students in the DMAS eligibility file. Further review is required by school division personnel.

Live Demonstration

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Eligibility Matching Tips / Best Practices

October 2018

Duplicate Matches

Always process your 'Duplicates' first!

Match	Non-Match	Review	RED	Last Name	First Name	DOB	Gender	Address Line 1	Address Line 2
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Acronese	Stephan	02/12/2003	M	7009 ANTONETTE DR	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Acronese	Stephan	02/12/2003	M	211 CANNA LAY LAKE APARTMENT 302	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Acronese	Stephan	02/12/2003	M	12304 WASHINGTON HIGHWAY	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Acronese	Stephan	02/12/2003	M	211 CANNA LAY LAKE APARTMENT 302	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Acronese	Stephan	02/12/2003	M	8101 PATTERSON AVENUE	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Acronese	Stephan	02/12/2003	M	211 CANNA LAY LAKE APARTMENT 302	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Acronese	Stephan	02/12/2003	M	360 KILBURN CIRCLE APARTMENT 108	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Acronese	Stephan	02/12/2003	M	211 CANNA LAY LAKE APARTMENT 302	

Individual Override

You can 'match' a student from any 'un-matched' status:

The screenshot shows the 'Individual Override' form in the UMMSIS system. The form is for a student named 'Macheneh Woldeyes' with a status of 'Unmatched'. The form includes fields for School District, Student ID, Last Name, First Name, Middle Name, DOB, Gender, Address Line 1, Address Line 2, City, State, and Zip. The 'Match' button is highlighted with a red circle.

Individual Inquiry

Look up a single student at a time using the 'Individual Inquiry' screen

Web Individual Inquiry


Fields marked with an *

*Last Name: *First Name: RID:
*Date Of Birth: *Gender: *Zip:

An exact match was found for your inquiry.

RID	Last Name	First Name	Middle Name	Date of Birth	Gender	Address Line 1	Address Line 2	City	State	Zip
1000559511	Apple	Amanda	A	01/08/2006	F	148 SUMMER STREET		RICHMOND	VA	21225

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23

History Matching

The system remembers the history of manual matching decisions from one quarter to the next

1. Records left in 'Possible Match' or 'Review Needed' status are not considered in history matching
2. 'Manually Matched' and 'Manually Rejected' pairs are remembered by the system and considered in history matching
3. In order for a pair (School Division record compared to DMAS record) to be either 'History Matched' or 'History Rejected', the exact same pair must occur in a future quarter (Name, DOB & Gender)
 - If any of those data elements changes on either the School Division record or the DMAS record, the system will not apply history matching

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24

Summary Report

	A	B	C	D	E	F	G	H	I	J
1	School Based Medicaid Eligibility Report									
2	Summary Report									
3	Effective Date:	12/01/2016								
4	Run Date:	10/20/2017								
5	Run Time:	10:40:14 AM								
6	School District:	ABC Public Schools								
7	File Name:	MSL_RSL_007000_2_2017_RL_20170000000000000000								
8	Number of Records in Q2 File:	1003								
9	File Status:	Finalized								
10										
11										
12										
13										
14	Medicaid	AUTO MATCHED	MANUAL MATCHED	HISTORY MATCHED	POSSIBLE MATCH	REVIEW NEEDED	AUTO REJECTED	MANUALLY REJECTED	HISTORY REJECTED	Record Count
15	Expansion	247	1	1	0	0	0	0	0	250
16	FAMIS	140	1	1	0	0	0	0	0	213
17	Total	3113	4	210	0	0	0	0	0	3327
18										
19	Administrative Claim Data									
20										
21	Total Students	1003								
22	Total Eligible Students (Excluding FAMIS)	3,110								
23	Medicaid Eligibility Rate:	47.48%								
24										
25	Cost Report Data (Q2 Only)									
26										
27	Total Medicaid Students	2,746								
28	Total Expansion Students	210								
29	Total FAMIS Students	211								
30	Total Students	883								
31	Medicaid Eligibility Rate:	50.00%								
32										

The sum of Auto Matched + Manual Matched + History Matched = Total Eligible

Note that all Q2 files will include this response section. The system does not know if the file being matched is your 12/1 child count file or not, so this section is always displayed on a Q2 match.


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Reports

School Division data appears on the left

Matching DMAS data appears on the right

School Division Upload File										DMAS Eligibility File			
RID	First Name	Middle Name	Date of Birth	Gender	Address Line 1	Address Line 2	City	State	Zip	DMAS RID	Last Name	First Name	Medicaid Type
001	JANICA		01/08/2006	F	148 SUMNER STREET		REHOBOTH	MA	01923	10000655111	APPLE	JANICA	A
002	GREGORY		01/08/2006	M	1400 SUNN DRIVE APT 10		REHOBOTH	MA	01923	10000677111	GINGER ROOT	GREGORY	A
003	LUCINDA		10/22/2001	F	300 PINE AVE		SPRINGFIELD	MA	01104	10000100000	GREY	LUCINDA	A
004	KALLY		01/08/2006	F	774 BUCKLEY STREET		REHOBOTH	MA	01923	10001111111	PIREARLE	KALLY	A
005	SALLY		01/08/2006	F	43 BEACH STREET		REHOBOTH	MA	01923	10007686111	STRAWBERRY	SALLY	A
006	TRINITY		01/08/2006	M	15 SAGE LANE	APT. 7	REHOBOTH	MA	01923	10000655111	WATERMELON	TRINITY	A
007	VIOLA		01/08/2006	F	66 HIGH RD		SPRINGFIELD	MA	01104	10001155438	VIOLET	VIOLA	A
008	JANE		01/08/2006	F	602 HAPPY RD		SPRINGFIELD	MA	01104	10000422222	WATERMELON	JANE	A
009	WENDY		01/08/2006	F	104 HAPPY STREET		REHOBOTH	MA	01923	10000655111	WHITE	WENDY	A


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Reports

Medicaid Type is identified in the DMAS record

DMAS Eligibility File													
RID	Last Name	First Name	Middle Name	Date of Birth	Gender	Address Line 1	Address Line 2	City	State	Zip	Medicaid Type		
10000655111	APPLE	JANICA		01/08/2006	F	148 SUMNER STREET		REHOBOTH	MA	01923	MEDICAID		
10000677111	GINGER ROOT	GREGORY		01/08/2006	M	1400 SUNN DRIVE APT 10		REHOBOTH	MA	01923	MEDICAID		
10007676864	GREY	LUCINDA		10/22/2001	F	300 PINE AVE		SPRINGFIELD	MA	01104	MEDICAID		
10001111111	PIREARLE	KALLY		01/08/2006	F	774 BUCKLEY STREET		REHOBOTH	MA	01923	FAMIS		
10007686111	STRAWBERRY	SALLY		01/08/2006	F	43 BEACH STREET		REHOBOTH	MA	01923	MEDICAID		
10000655111	WATERMELON	TRINITY		01/08/2006	M	15 SAGE LANE	APT. 7	REHOBOTH	MA	01923	FAMIS		
10001155438	VIOLET	VIOLA		01/08/2006	F	66 HIGH RD		SPRINGFIELD	MA	01104	EXPANSION		
10004222222	WATERMELON	JANE		01/08/2006	F	602 HAPPY RD		SPRINGFIELD	MA	01104	MEDICAID		
10000655111	WHITE	WENDY		01/08/2006	F	104 HAPPY STREET		REHOBOTH	MA	01923	MEDICAID		

This is important for identifying and excluding FAMIS students from eligibility statistics for Administrative Claims

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New Last Year

1. New Eligibility Fields included from DMAS – school divisions will receive this additional information about every matched student!
 - New Field #1: Aid Category
 - New Field #2: Aid Category Description
 - New Field #3: Benefit Plan Start Date
2. DMAS is now including 2 year olds on the state-wide eligibility matching file, increasing eligibility percentages by including more Medicaid eligible students!
3. If you would like to use our system to look up individual student eligibility after you finalize your claim statistics, you can upload the same eligibility file and leave it in 'uploaded' status so it will still be accessible to you (if you finalize, it locks you out)

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28

Other Use of Eligibility Matching System

- We do use the Eligibility Matching system and process for one other purpose that was not reviewed today:
 - **BCR!**
- Details of how this is used when completing your BCR will be included in the Cost Report & BCR presentation.

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29

Contact Information

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30
